



MSIX Webinar

MSIX Refresher Webinar

August 21, 2014



Presenters



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Agenda

- MSIX Overview
- MSIX Functionality
 - Account Management
 - Navigation and Student Search
 - Worklists
 - Reports
- Available resources

Legal Reference for Records Exchange

Transfer of Records

Section 1304(b)(3) requires State Education Agencies (SEAs) to promote interstate and intrastate coordination by providing for educational continuity through the timely transfer of pertinent school records (including health information) when children move from one school to another, whether or not the move occurs during the regular school year.



Statute

Part C of Title I of the Elementary and Secondary Education Act (ESEA) of 1965 – Sections 1304(b)(3) and 1308(b)



CFR

34 CFR 200.82(c)



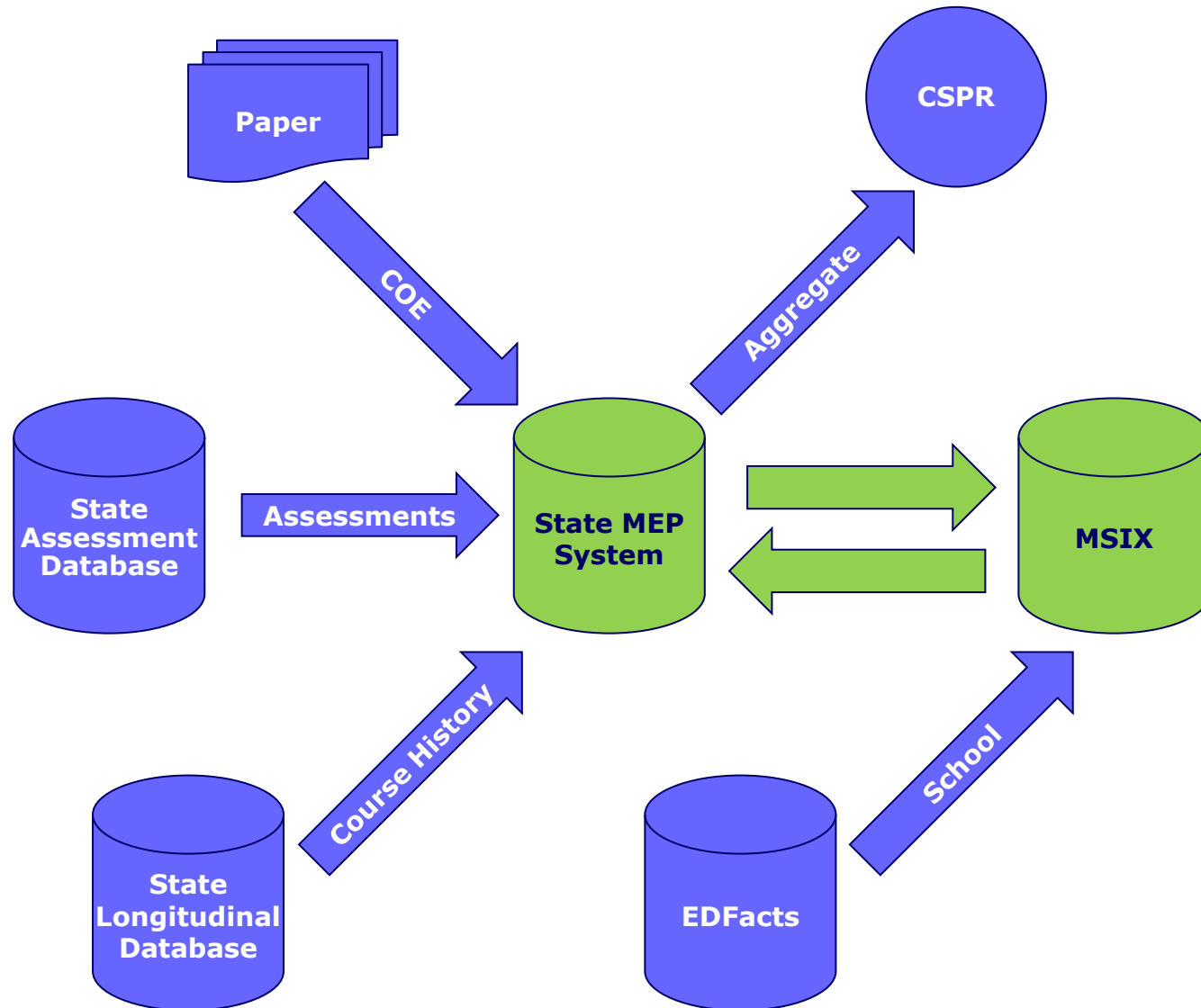
NRG

Non-Regulatory Guidance for Title I, Part C, Education of Migratory Children
October 2010, VI (D).

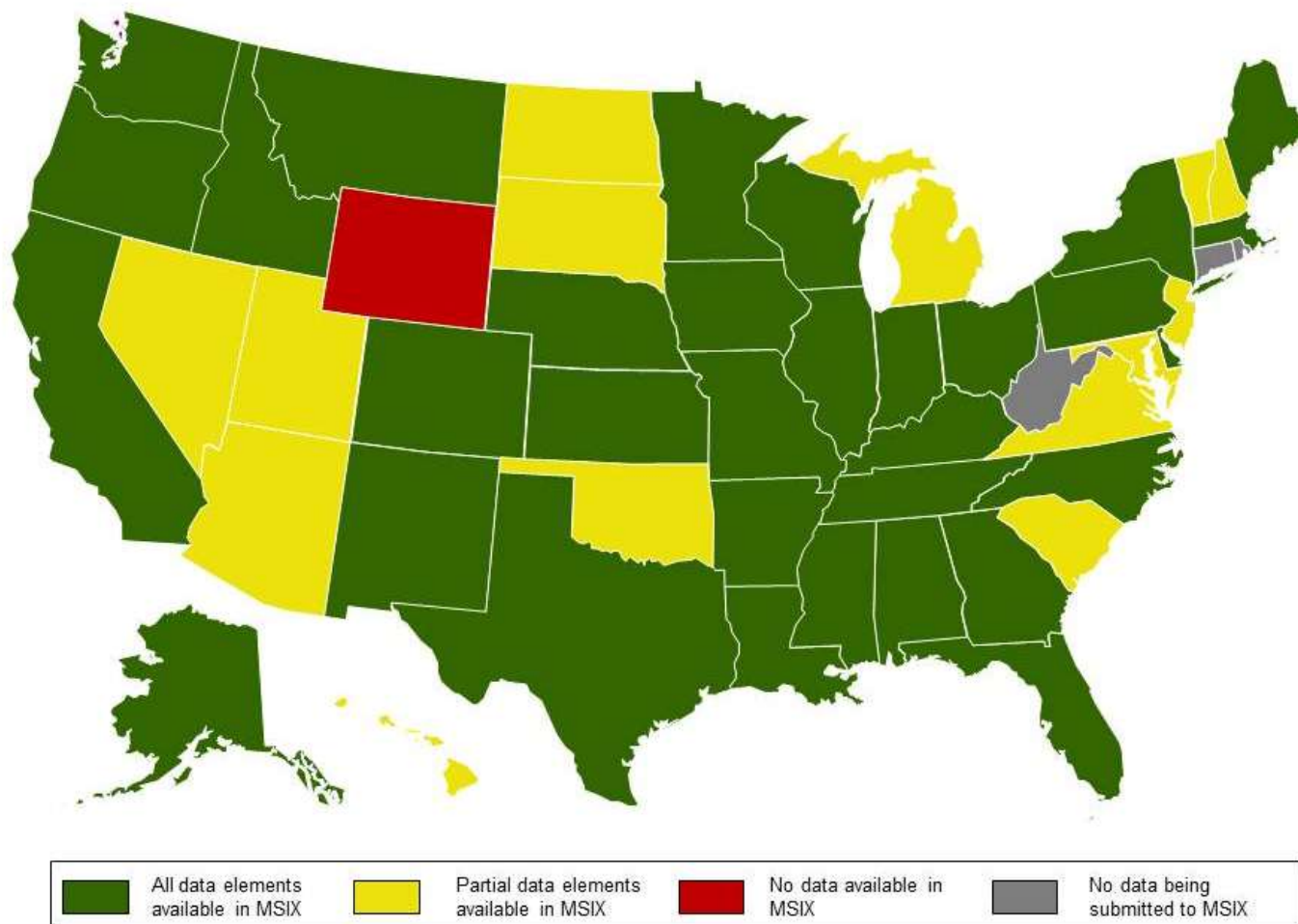
Records Exchange Initiative Goals

Goal	Description
1	Create an electronic exchange for the transfer of migrant student education and health data amongst the States.
2	Promote the use of the Migrant Student Information Exchange (MSIX).
3	Ensure the use of the consolidated migrant student record for the purposes of enrollment, placement, and accrual of credits of migrant students.
4	Produce national data on the migrant population.

MSIX is part of a collection of information systems that support State Migrant Education Programs



MSIX Status and Update: State Implementation Status



Status as of 8/21/2014

https://msix.ed.gov/msix_html/msixImplStatus.html

Sample MSIX Activities in the School Year

State MEP Director / Administration

- Work with State User Administrators to update the user accounts (e.g., reviewing user account report)
- Work with recruiters to understand the MSIX missed enrollment reports
- Ensure the previous academic year records are closed, ensuring secondary credits, withdrawal dates, etc. are complete for the student
- Use MSIX Reports to enhance data being sent to MSIX, identify moving trends , and potential missed enrollments

Regional and District Staff

- Utilize tools (e.g., MSIX) to support program initiatives for the academic year with State Directors and Administrators
- Support local staff to ensure Data entry in the State system is complete and accurate

Recruiters

- Gain access to MSIX and take the online training
- Utilize student search as a tool to help recruiting
- Work with state, regional, or district Data Administrators to get access to various reports (e.g., Student Enrollment and Student Mobility reports) to support recruiting efforts

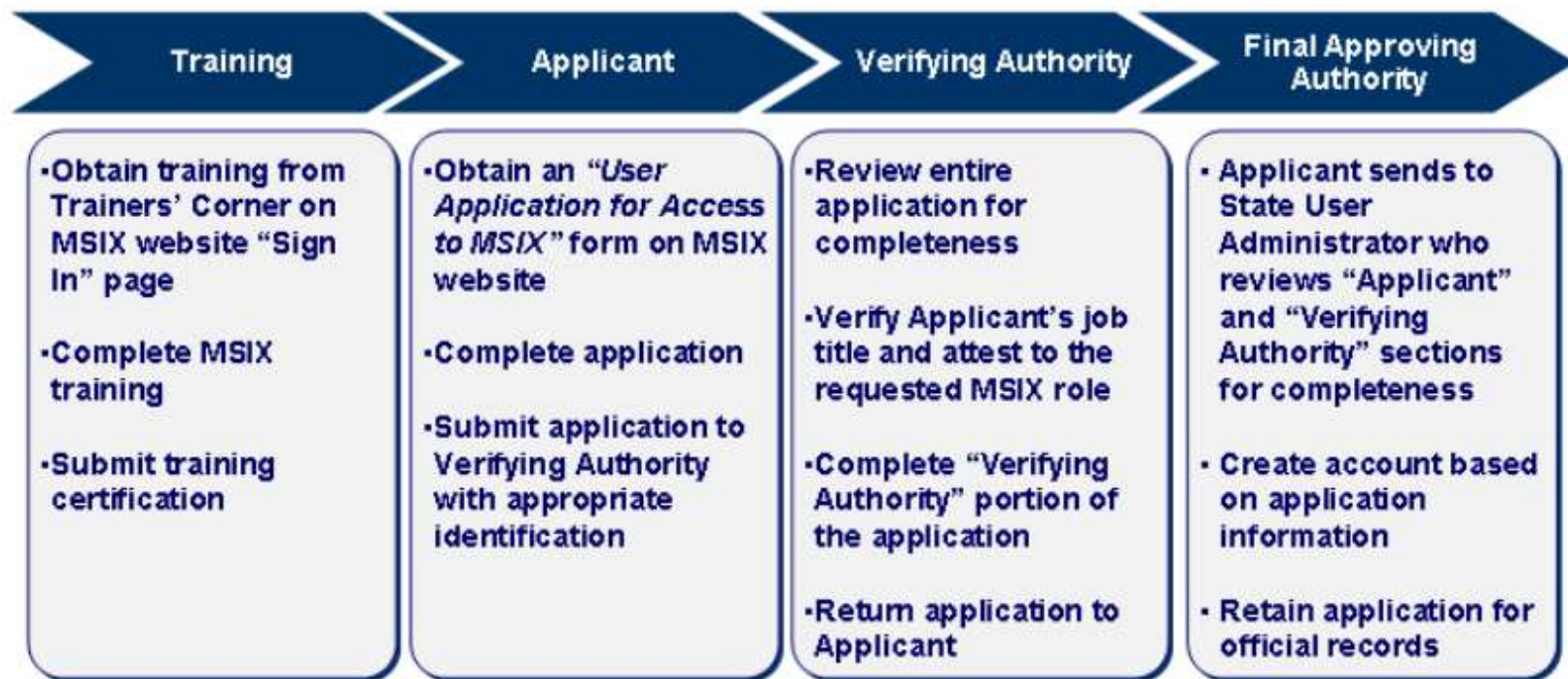
Account Management

Account Management: Obtain an Account [New User]

New Users must follow the process below to obtain an account.

(MSIX Sign In page > Trainer's Corner

MSIX Sign In page > How Do I Get an Account?)



Account Management: Create an Account [User Administrator]

User Administrators need to go to the User Administration Link to create a new user.
(Sign In > MSIX Welcome Page > User Administration > Create New User)

Create or Update MSIX User

To create a new MSIX user, please enter all the required information. Required fields are identified with an asterisk (*).
If user's password is reset, MSIX will generate an email to user's email account that contains the new password.

[Click for Create/Update Instructions](#)

Navigation Sidebar:

- Home
- Student Search
- Reports
- Regional Administration
- Workflows
- Potential Merge List
- Potential Split List
- User Administration
- Log Settings
- Records Exchange Initiative
- External Links
- Course Catalog
- Standardized Tests
- RESULTS
- RESULTS
- NCES
- State MSP Directors

MSIX
Migrant Student Information Exchange

Form Fields:

- First Name: *
- Last Name: *
- Job Title:
- Work Address Line 1:
- Work Address Line 2:
- Work City:
- Work Zip Code:
- Work Telephone Number: * - - Ext. *
- Work Email Address: *
- Work State: Select a State
- User Role: *
- Account Activation Date: (MM/DD/YYYY) 10
- Account Expiration Date: (MM/DD/YYYY) 10

User Role Options:

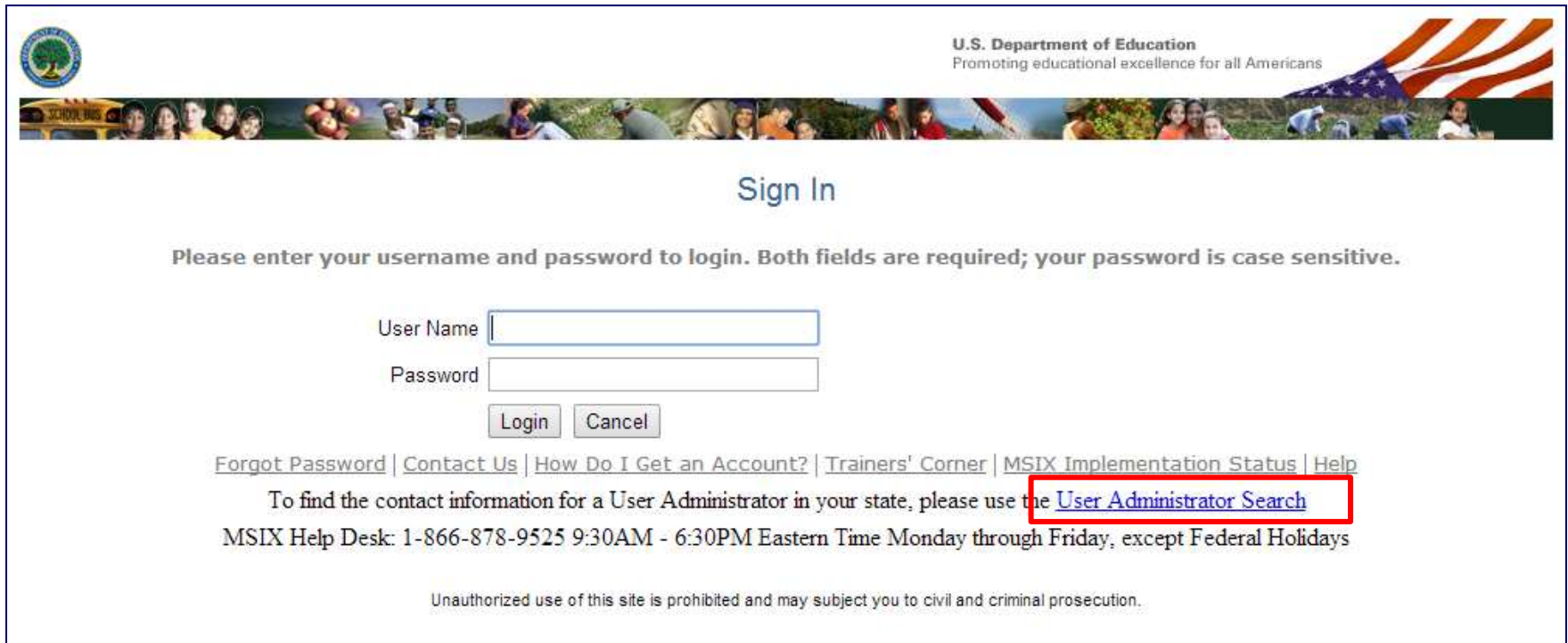
- ☐ District Data Administrator
- ☐ Government Administrator
- ☐ MSIX Privacy Act User
- ☐ MSIX Primary
- ☐ MSIX Secondary
- ☐ MSIX Super User
- ☐ OME User Administrator
- ☐ State Batch Submitter
- ☐ State Data Administrator
- ☐ State Regional Administrator
- ☐ State User Administrator

Buttons: Next, Cancel

Account Management: Lost Password [All Users]

The User needs to request that their password be reset by their User Administrator. The User Administrator contact information can be found by clicking the 'User Administrator Search' link.

(MSIX Sign In page > User Administrator Search)



The screenshot shows the MSIX Sign In page. At the top, there is a banner with the U.S. Department of Education logo on the left and the text "U.S. Department of Education Promoting educational excellence for all Americans" on the right. Below the banner is a horizontal strip of images showing diverse students. The main heading "Sign In" is centered. Below it, a message states: "Please enter your username and password to login. Both fields are required; your password is case sensitive." There are two input fields: "User Name" and "Password". Below the "Password" field are "Login" and "Cancel" buttons. At the bottom, there is a row of links: "Forgot Password", "Contact Us", "How Do I Get an Account?", "Trainers' Corner", "MSIX Implementation Status", and "Help". The "User Administrator Search" link is highlighted with a red box. Below the links, it says: "To find the contact information for a User Administrator in your state, please use the User Administrator Search". At the very bottom, it provides the MSIX Help Desk contact information: "1-866-878-9525 9:30AM - 6:30PM Eastern Time Monday through Friday, except Federal Holidays" and a disclaimer: "Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution."

U.S. Department of Education
Promoting educational excellence for all Americans

Sign In

Please enter your username and password to login. Both fields are required; your password is case sensitive.

User Name

Password

[Forgot Password](#) | [Contact Us](#) | [How Do I Get an Account?](#) | [Trainers' Corner](#) | [MSIX Implementation Status](#) | [Help](#)

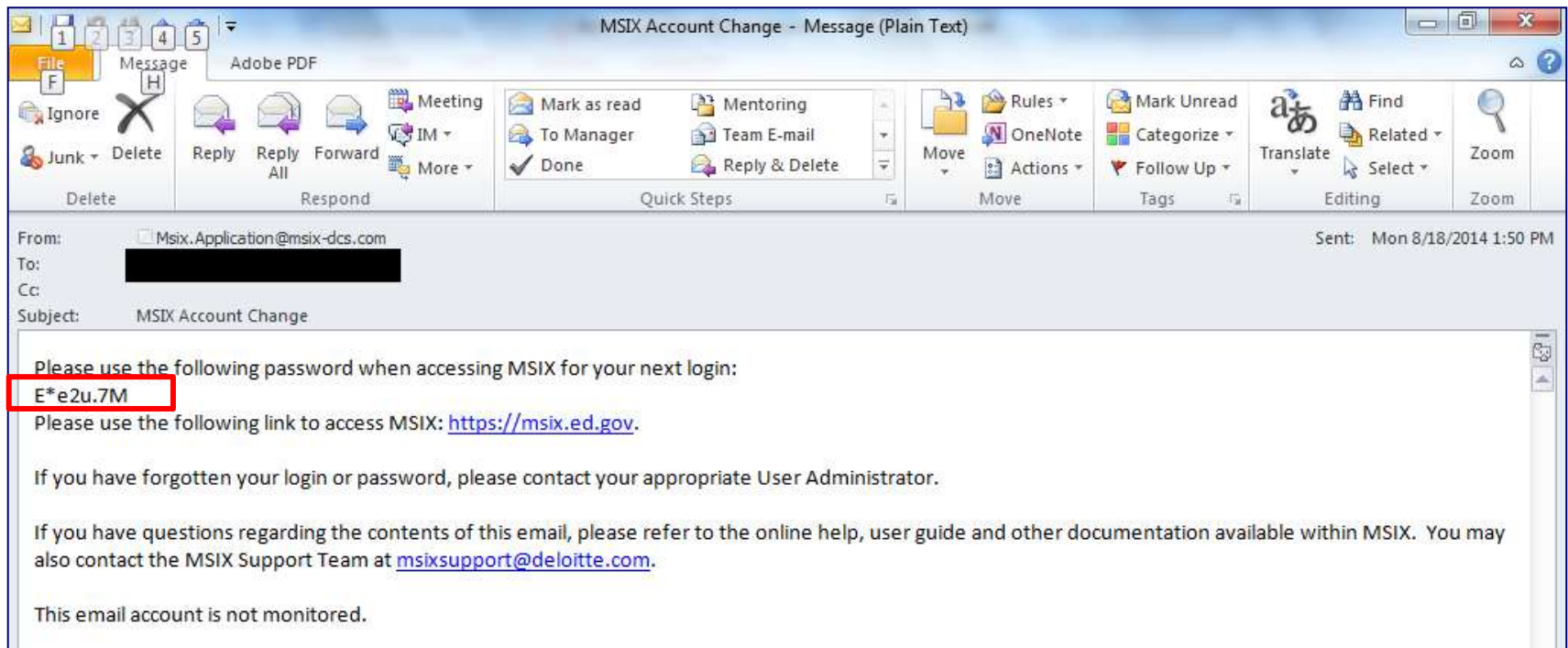
To find the contact information for a User Administrator in your state, please use the [User Administrator Search](#)

MSIX Help Desk: 1-866-878-9525 9:30AM - 6:30PM Eastern Time Monday through Friday, except Federal Holidays

Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution.

Account Management: Lost Password [All Users] (Cont.)

The User receives the following email notification once the User Administrator resets User's password. The User will use the temporary password to login to MSIX and reset their password.



Account Management: Lost Password [All Users] (Cont.)

The User will be prompted to change their password once they log in. They will need to use the temporary password from the email sent from the MSIX system.

Change Password

If you received an email with a temporary password for a new MSIX account, or due to a password reset, please enter the temporary password from email in the first box below.

If you were notified when you attempted to sign into MSIX that your previous MSIX password has expired, please enter the expired password in the first box below. Create a new password and enter it in the second and third boxes below. You will then use this new password to sign into MSIX.

Your MSIX Password must:

- *Contain at least eight (8) characters;
- *Contain all of the following types of characters:
 - Capital letters
 - Lower-case letters
 - Numbers
 - Special characters (#, @, !, ^, &, etc.)
- *Be different from your past 6 passwords.

Error

User Name kscott

Expired or Temporary Password

New Password

Confirm New Password

You must change your password before you can continue


Your new password:

- Is at least eight (8) characters
- Contains a capital letter
- Contains a lower-case letter
- Contains a number
- Contains a special character
- "New Password" matches "Confirm New Password"


Navigation & Student Search

Basic Navigation

This is what the Welcome Page looks like for a Primary User.



U.S. Department of Education
Promoting educational excellence for all Americans



My Account | Training | Contact Us | Help | Logout

Last Login: 06/13/2012 11:19:12 ET

Home

Student Search

Reports

Potential Merge List

Potential Split List

Records Exchange Initiative

External Links:

Course Catalog


Standardized Tests

REACTS

RESULTS


NCES

State MEP Directors



Training-3 Primary, Welcome to MSIX

The MSIX site and all its components are designed to facilitate the exchange of migrant student records for the purposes of school enrollment, placement, and accrual of credit in school.



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Rules Of Behavior | ED | OME

Student Search [Data Administrators, Primary, & Secondary Users]

Basic Search supports the most common searches

- Student Name
- Student Date of Birth
- Student Gender
- MSIX ID
- State Student ID
- State

Basic Student Search

Please enter your search criteria below. Ensure that your search contains at least one of the following elements:

1. Student MSIX ID.
2. State Student ID.
3. Student First, Middle, or Last Name.

Partial searches are allowed by entering at least one character and selecting the "Partial" search option. Use "Exact" to search for an exact match on the information that you entered in a given field.

Please click [Advanced Search](#) for a more in-depth search capability.

[Non-English Character Instructions](#)

Last Name:

☐ Exact ☒ Partial

First Name:

☐ Exact ☒ Partial

Middle Name:

☐ Exact ☒ Partial

Student Sex:

Student DOB:



MSIX ID:

☐ Exact ☒ Partial

Student State ID:

☐ Exact ☒ Partial

State:

Student Search (cont'd)

Advanced Search provides additional search parameters

- *All Basic Search parameters, plus...*
- Student Last Name 2
- Student Suffix
- Female Parent Name
- Male Parent Name
- Student Birth Location
- Multiple Birth Flag

The screenshot shows a web interface for 'Advanced Student Search'. On the left is a blue sidebar with a menu of links: Home, Student Search, Reports, Profiles, Potential Merges List, Potential Split List, User Administration, State Profile, Records Exchange Initiative, External Links, Course Catalog, Standardized Tests, RESULTS, NCES, and State MEP Directors. Below the menu is the MSIX logo (Migrant Student Information Exchange). The main content area is titled 'Advanced Student Search' and includes instructions: 'Please enter your search criteria below. Ensure that your search contains at least one of the following elements: 1. Student MSIX ID, 2. State Student ID, 3. Student First, Middle, or Last Name.' It also states: 'Partial searches are allowed by entering at least one character and selecting the "Partial" search option. Use "Exact" to search for an exact match on the information that you entered in a given field.' and provides a link: 'Click here to return to a Basic Search.' The search fields include: Last Name 1, Last Name 2, First Name, Middle Name, Suffix, Student Sex (dropdown), Student DOB (MM/DD/YYYY), Birth Country (dropdown), Birth State (dropdown), Multiple Birth Flag (dropdown), Male Parent Last Name, Male Parent First Name, Female Parent Last Name, Female Parent First Name, MSIX ID, Student State ID, and State (dropdown). Each field has radio buttons for 'Exact' and 'Partial' search options. 'Search' and 'Clear' buttons are at the top right.

Student Search – Tips and Tricks

- Only specific user roles have access to student search functionality
 - Primary Users
 - Secondary Users
 - Data Administrators
- Some basic information must be provided for each search
 - Student Name (First, Middle, or Last)
 - MSIX ID
 - State Student ID
- Searches can be “Partial” or “Exact”
 - Partial searches include a “Wild Card” at the end of each search string:
“Juan” can yield results such as “Juan”, “Juanita”, and “Juana”
 - Exact searches only search for the text specified:
“Juan” will only yield results of “Juan”
- Perform multiple searches in order to ensure a thorough search
 - Students with special characters (e.g., ñ, é, etc.); try searching with and without the special characters
 - Students with two last names; try searching a combination of the names using the Last Name 1 and Last Name 2 fields

Student Search – Demonstration 1: Recruiter searching for family members

Scenario

You have completed the family/student interview and want to make sure you've captured all the information they provided you. You know that sometimes there are other children in the family that get missed in the interview for various reasons.

MSIX Practice

Perform a *Student Search* with the details provided to see if the family has been in the MEP. Utilize the Student last name, parents name, and move from city fields.

Student Search – Demonstration 1:

Recruiter searching for family members (cont'd)

You interviewed a student's Parents and you wanted to see if there were any siblings in the MSIX system, so you search for students with the same parents' names.

The screenshot displays the MSIX Basic Student Search interface. The search criteria entered are:

- Last Name: Sri
- First Name: Tangirala
- Middle Name: (empty)
- Student Sex: Male
- Student DOB: 01/13/2001
- MSIX ID: (empty)
- Student State ID: MD
- State: MD

The search results show a consolidated student record for Sri Tangirala, State ID: MD0000, State: MD. The record includes the following information:

Student Information			
Name:	Sri Tangirala	Sex:	Male
Birth Date:	01/13/2001	Multiple Births:	No
Birth Location:	Philadelphia, Pennsylvania, United States	Birth Date Verification:	Other
Male Parent:			
Female Parent:	Lorena Tangirala		
Expiration Date:	07/19/2010	Continuing Service Reason:	

The record also includes the following information:


Most Recent Qualifying Arrival Information	
Qualifying Arrival Date:	
Qualifying Move From Location:	Little Creek, Maryland, United ...
Qualifying Move To Location:	Sequoia, GA
Expiration Date:	07/19/2010
Continuing Service Reason:	

The interface also includes a sidebar with navigation links and a footer with the MSIX logo and copyright information.

Student Search – Demonstration 1:

Recruiter searching for family members (cont'd)

Once you find a student whose information you'd like to print or keep a copy of you can download a **Consolidated Student Record Report**.

**MSIX**
Migrant Student
Information Exchange

Student Consolidated Record Report

Rombot, Joshua

DOB: 03/28/2005

MSIX Identification # 346653229438

Student Demographics					
Student Full Name	Sex	Birth Date	Birth Location	Male Parent	Female Parent
Joshua Rombot	Male	03/28/2005	Austin, Texas, United States	Roger Rombot	Nancy Rombot

Most Recent Qualifying Move		
QAD	Move From Location	Move To Location
06/03/1999	Austin, Texas, United States	Dallas, TX

Enrollments						
School or Project Name	Academic Year	Enrollment Date	Enrollment Type	LEP	IEP	PFS
VISTA DEL FUTURO CHARTER SCHOOL 7310 BISHOP FLORES EL PASO, PA 79912 VISTA DEL FUTURO CHARTER SCHOOL 915-855-8143	1999-2000	08/29/2000	Year Round MEP-Funded Project	Yes	No	No

Course History - Failed and Incomplete Coursework						
No Unresolved Course Data is available						

Course History - Resolved Coursework						
Vista School/1999-2000						
Course Title	Subject Area	Course Type	Course Section	Grade Level	Final Grade	Credits Granted
English 101	English	Other			A	3

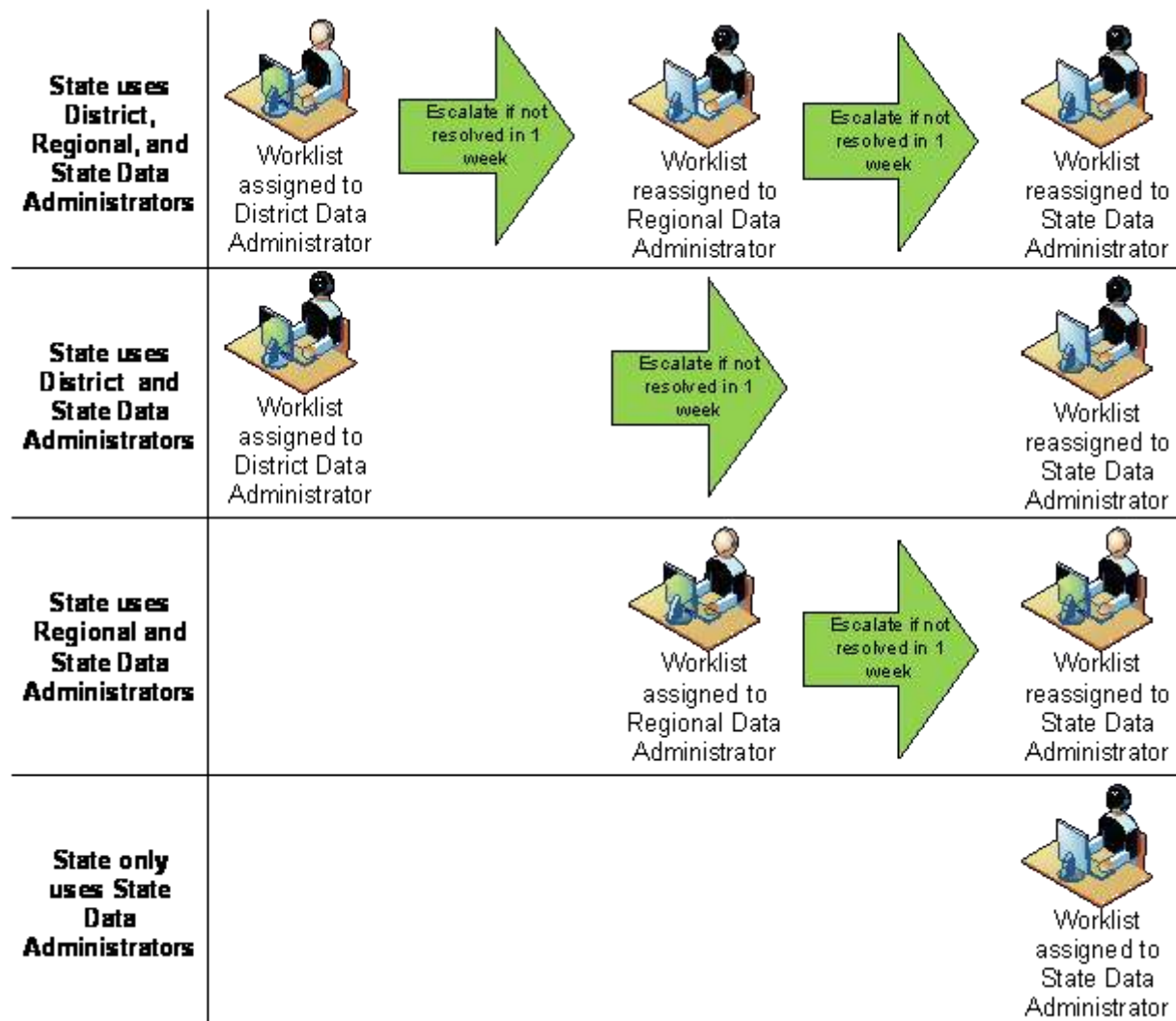
Assessments				
Vista School				
Assessment Title	Date	Assessment Content	Assessment Type	Interpretation
English Assessment		Literature		Basic

Medical Information		
School/Project Name	Immunization Record	Med Alert
VISTA DEL FUTURO CHARTER SCHOOL	Yes	Acute

Worklists

Worklists – Escalation Process [Data Administrators]

Trainer's Corner > Worklist Change notes > Worklist Escalation Overview (v3.06.01)

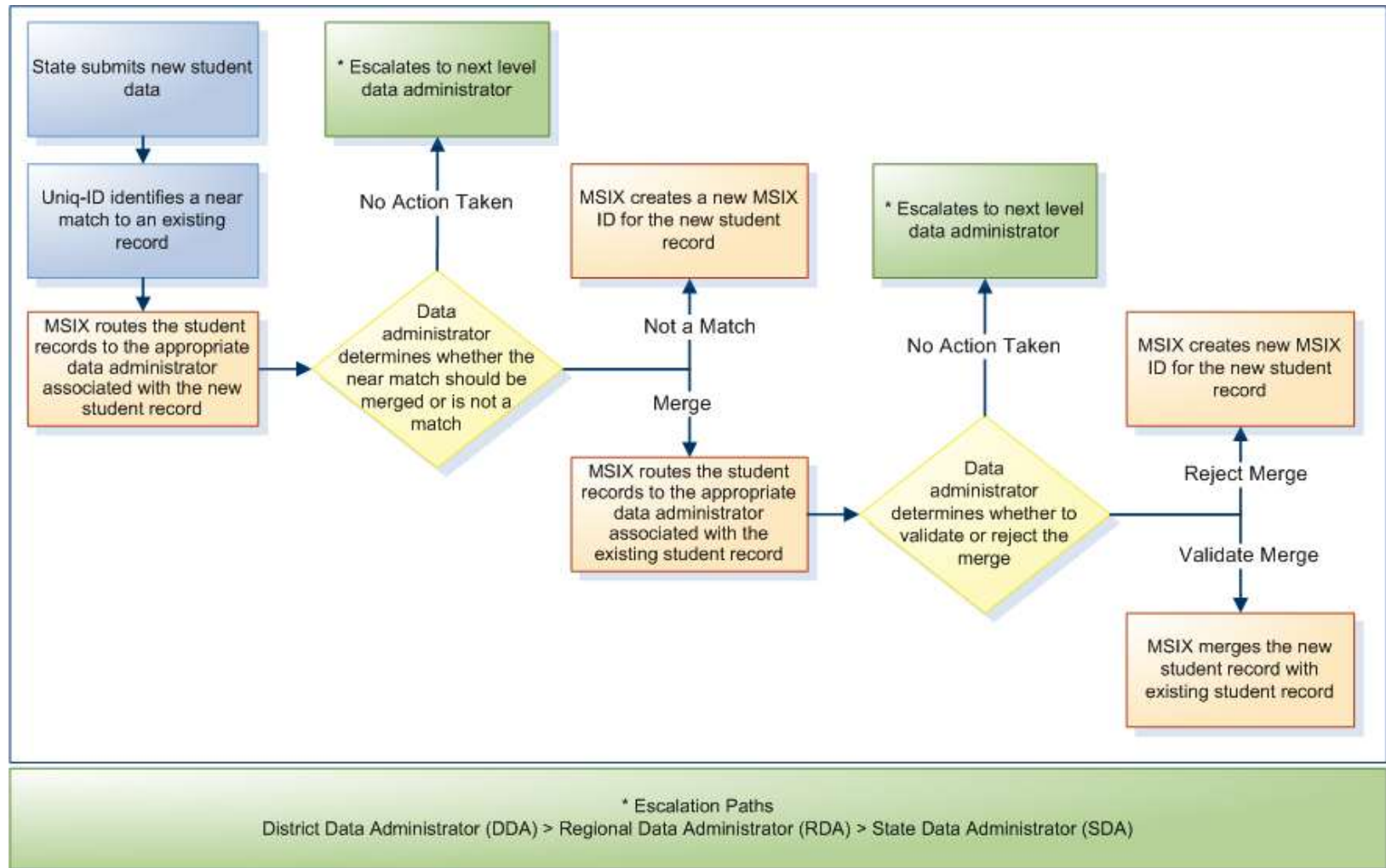


Worklists – Types and Escalation Timeline

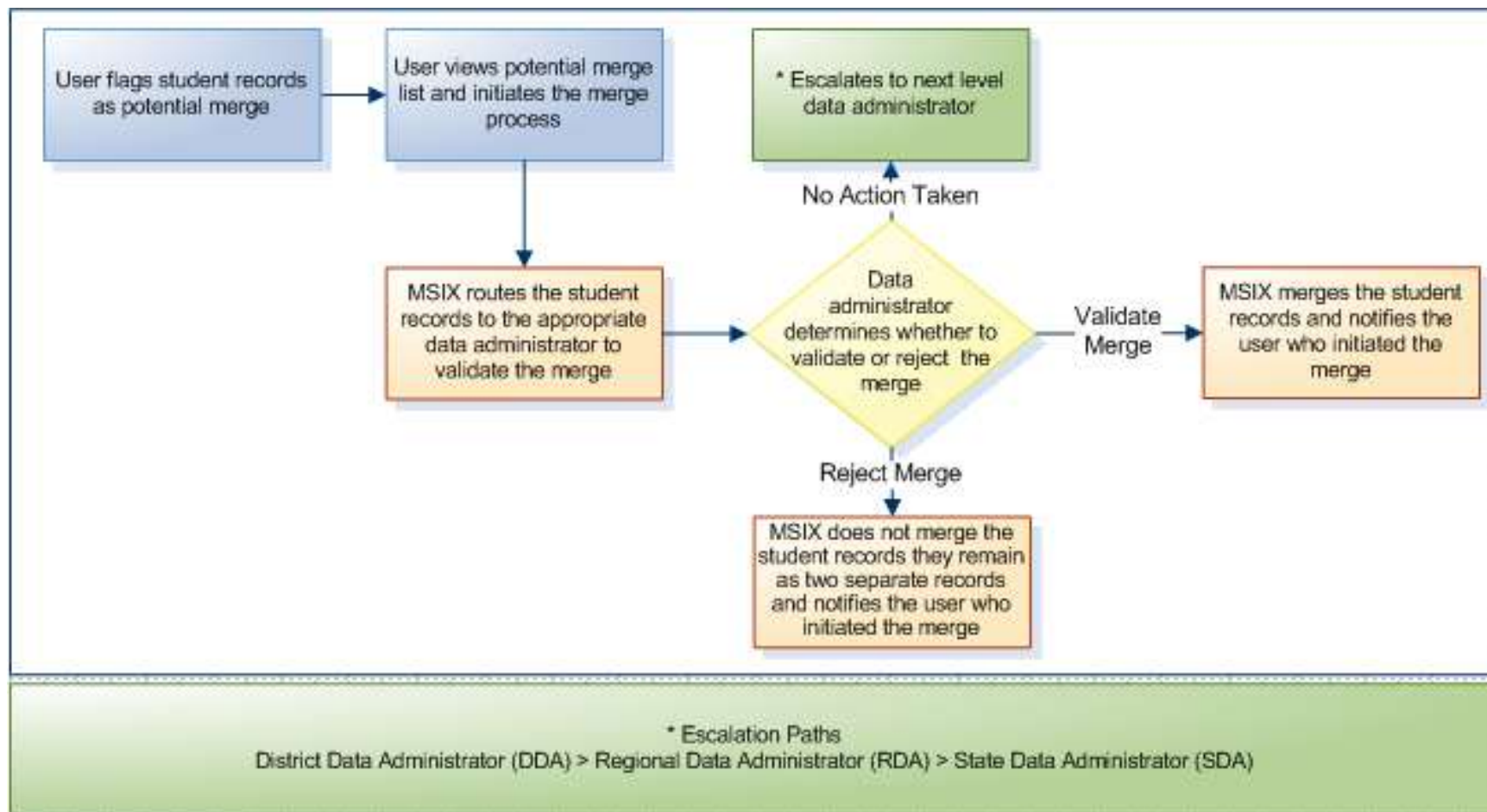
- Near Matches
- Validate Merge
- Validate User Initiated Merge
- Validate Split

Data Administrators in State	District Level	Regional Level	State Level	Total Escalation Timeframe
District, Regional & State	1 week	1 week	1 week	3 weeks
District & State	1 week		2 weeks	3 weeks
Regional & State		1 week	2 weeks	3 weeks
State			3 weeks	3 weeks

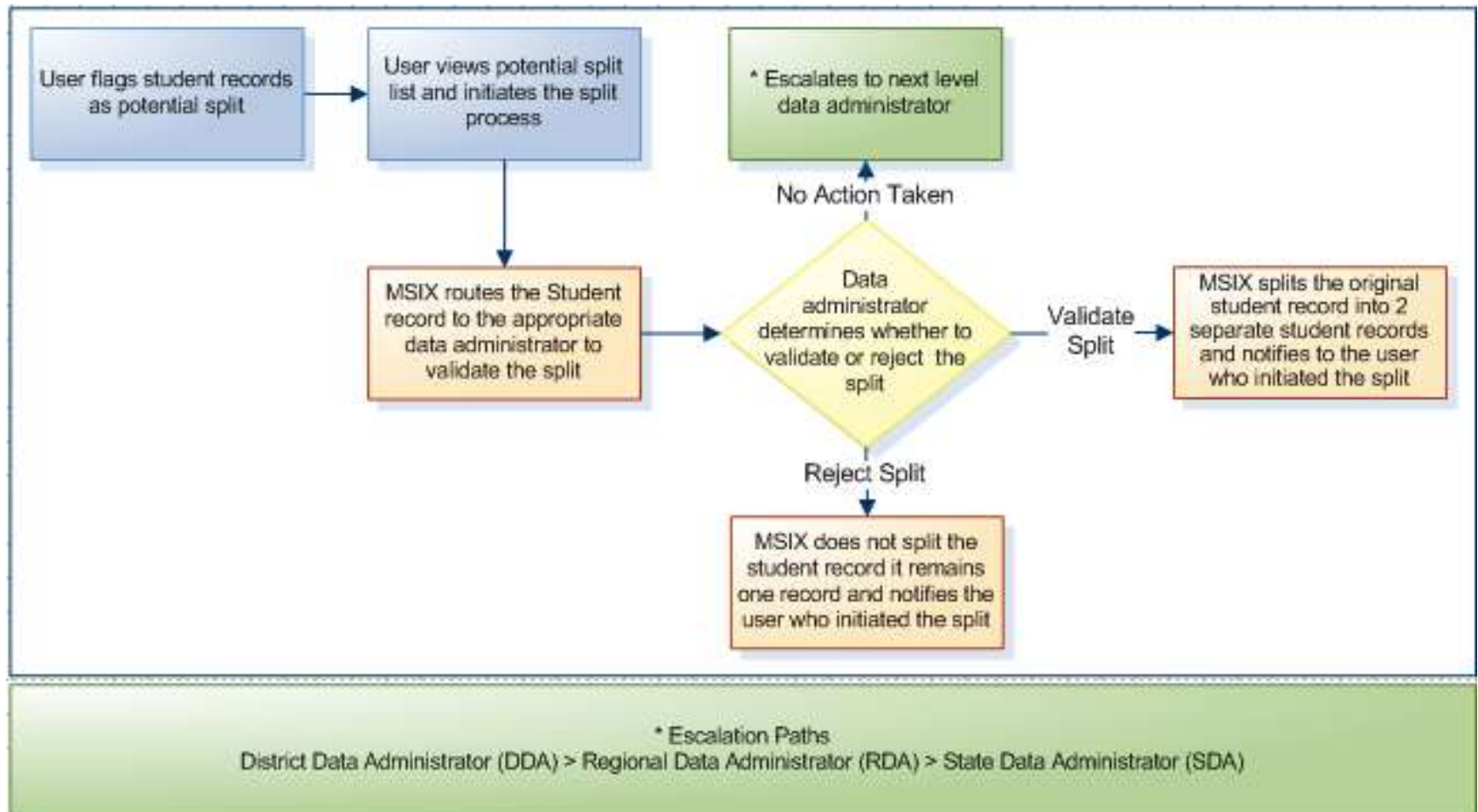
Worklists – Near Match Process



Worklists – User Initiated Merge Process



Worklists – User Initiated Split Process



Worklists – Demonstration 2: Near Match [Data Administrators]

Home

Student Search

Reports


Worklist

Potential Merge List


Potential Split List

Records Exchange Initiative


External Links:
Course Catalog
Standardized Tests
KEACTS
RESULTS
NICES
State MEP Directors


Migrant Student
Information Exchange

Near Match Process


1. Select Worklist Item
2. Evaluate Match and Determine Action
3. Confirm

Near Match Process Flow



Worklist: Near Match Resolution

[Return to Worklist](#)

New student record(s) has/have been submitted for validation. Please validate or reject the merge of the student record by clicking on the appropriate button. If you reject the merge, then a new MSIX ID will be created for the student record. If you validate the merge, the student records will be merged into one.

- If this is a new student, please click on the "New MSIX ID" button to create a new MSIX student ID.
- If any of the records are a match, please check one record at a time and click the "Merge Record" button.
- If none of the records are a match to the new student record, please select all the records and click the "Not a Match" button.


[View the History of this](#)

Worklist ID: 34937

New Student Record:

The New Student Record is a record recently submitted to one or more records already in MSIX.

New MSIX ID


Migrant Student
Information Exchange

New MSIX ID

Submitting State: Florida

MSIX ID:

Birth Date: 05/15/1997

Multiple Birth: No

Male Parent: Winfred Shumake

Female Parent: Janzie Shumake

Student State ID: USA05

Student Name: Mary Elizabeth Shumake

Birth Location: MEXICO CITY Mexico

Sex: Female

Data Administrator Information

Near Matches Found in MSIX:

The records below are potential matches to the New Student Record above.

Submitting State: Florida

MSIX ID: 462672374976

Birth Date: 05/15/1997

Multiple Birth: No

Male Parent: Steve Shumake

Female Parent: Janet Shumake

Student State ID: FL66666

Student Name: Mary E Shumake

Birth Location: MEXICO CITY Mexico

Sex: Female

Data Administrator Information

Comments:

Max Length = 250 characters

To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information in Comments fields. Comments entered below will be shared unedited and in their entirety with other MSIX Users.

Not a Match

Merge Record

Reports

Reports – Reports User Access

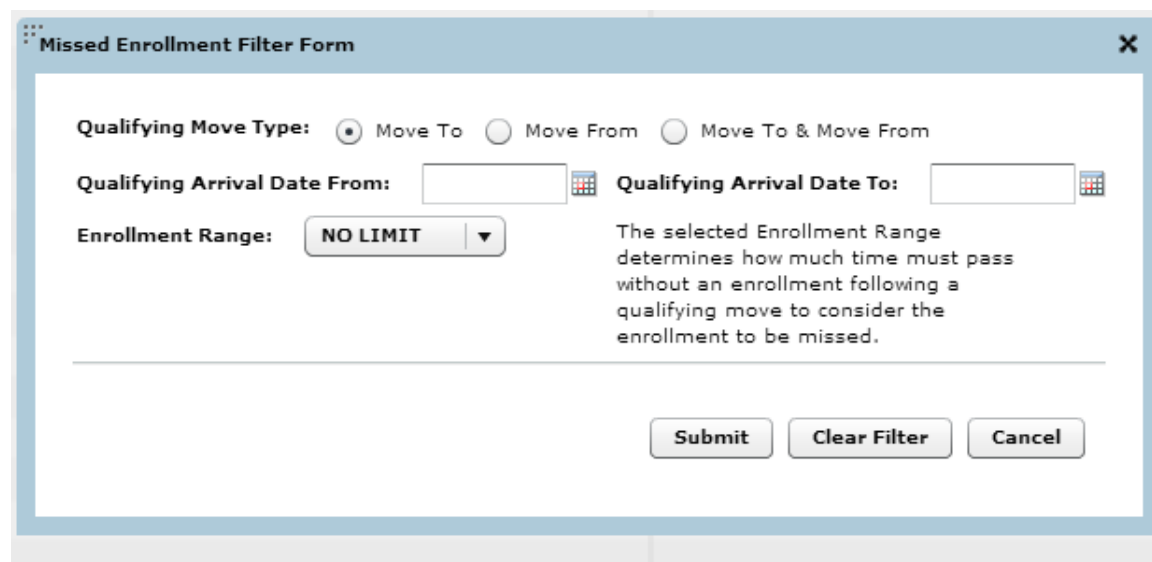
User Account Type	Report Name	Data Admin	Primary & Secondary Users	Region/ State User Admin	User Admins	State Batch Submitter
User Account	Accounts List		✓	✓	✓	
Student Info	MSIX Student Count	✓	✓			
	Student Demographic	✓	✓			
	Enrollments by MDE Type	✓	✓			
	Enrollments in Multiple States	✓	✓			
	Grade Retention Report	✓				
	Missed Enrollment Report	✓				
	Student Course History	✓	✓			
	Student Assessment	✓	✓			
Student Mobility	General Move From	✓	✓			
	General Move To	✓	✓			
Worklists	Worklists By User	✓				
	Worklist Aging	✓				
Data Quality	Data Load Files	✓				✓
	Data Completeness	✓				✓
	Data Validity	✓				✓
	Potential Duplicates	✓				

Reports – Demonstration 3: Missed Enrollment Report [Data Administrators]

Scenario: The new local agriculture season is starting and you know migrant families have already moved into your district [i.e., students with a Qualified Arrival Date (QAD)]. However, you know that many of their students are not enrolled. How do you identify those students who have yet to enroll?

The peak recruiting season just ended for your district. Now you want to check if recently recruited students are enrolled

MSIX Practice: Use *Missed Enrollments Report* to identify students have yet to enroll.



The screenshot shows a web-based form titled "Missed Enrollment Filter Form". It contains the following fields and controls:

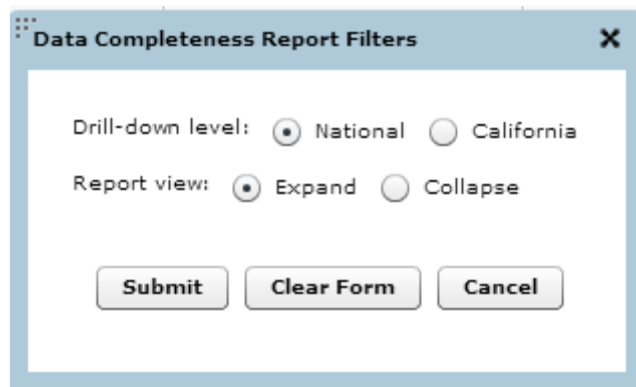
- Qualifying Move Type:** Three radio buttons are present: "Move To" (selected), "Move From", and "Move To & Move From".
- Qualifying Arrival Date From:** A text input field followed by a calendar icon.
- Qualifying Arrival Date To:** A text input field followed by a calendar icon.
- Enrollment Range:** A dropdown menu currently showing "NO LIMIT".
- Help Text:** A paragraph explaining that the selected Enrollment Range determines how much time must pass without an enrollment following a qualifying move to consider the enrollment to be missed.
- Buttons:** "Submit", "Clear Filter", and "Cancel" buttons are located at the bottom right of the form.

Reports – Demonstration 4: Data Quality Reports

[Data Administrators]

Scenario: You just completed submitting all the data for the previous academic year. You ensure that the data is complete and valid.

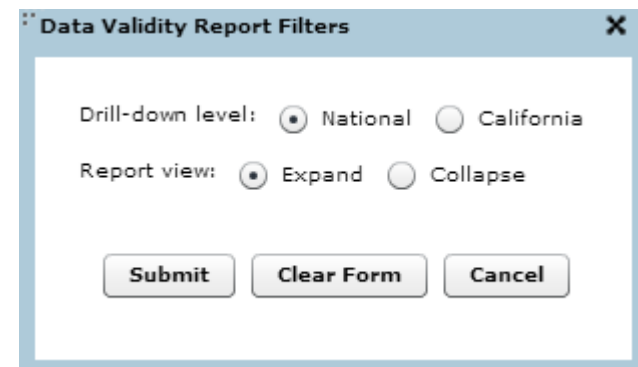
MSIX Practice: Use *Data Quality Reports* to identify any gaps in the data between your State's system and MSIX.



Data Completeness Report Filters [X]

Drill-down level: ☒ National ☐ California

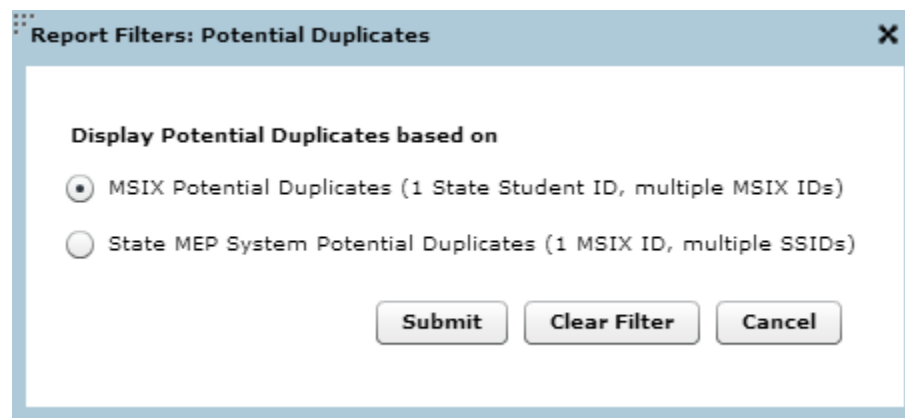
Report view: ☒ Expand ☐ Collapse



Data Validity Report Filters [X]

Drill-down level: ☒ National ☐ California

Report view: ☒ Expand ☐ Collapse



Report Filters: Potential Duplicates [X]

Display Potential Duplicates based on

☒ MSIX Potential Duplicates (1 State Student ID, multiple MSIX IDs)

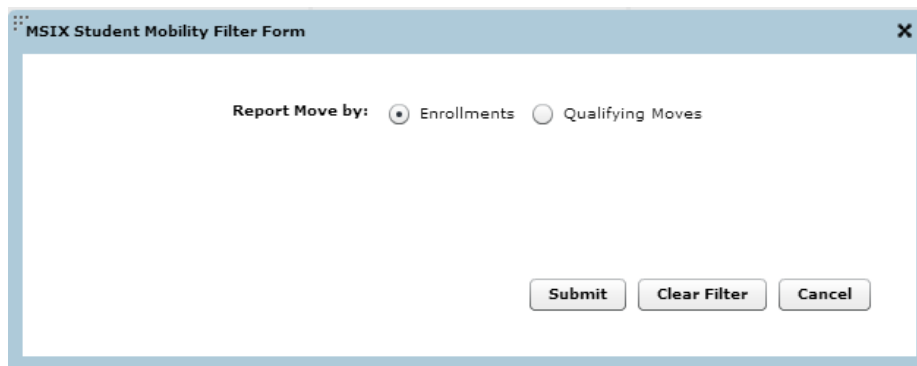
☐ State MEP System Potential Duplicates (1 MSIX ID, multiple SSIDs)

Reports – Demonstration 5: Other Reports [Data Administrators]

Scenario: You and your ID&R team are planning for your recruiting season for the school year. You want to proactively identify areas and movement timing of migrant families.

MSIX Practice #1:

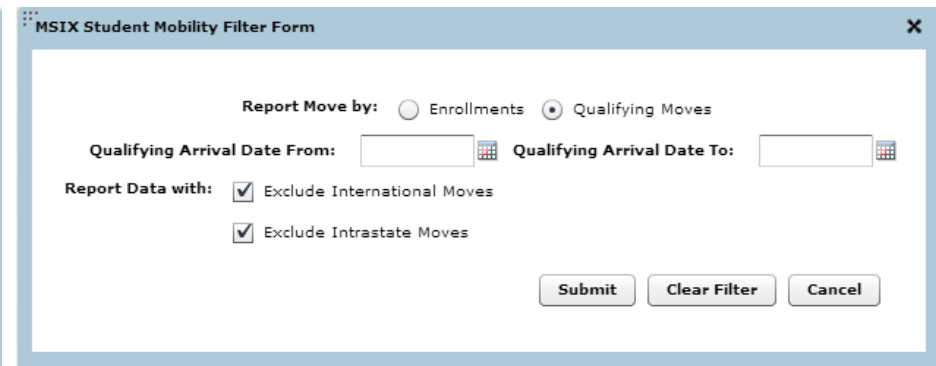
Use the MSIX **General Move To Report** to analyze student movement trends, understand the number of students that move out of the user's state at different times of the year, and which states most students move to. Recruiters can predict busy periods in which students are moving into their state.



MSIX Student Mobility Filter Form

Report Move by: ☒ Enrollments ☐ Qualifying Moves

Submit Clear Filter Cancel



MSIX Student Mobility Filter Form

Report Move by: ☐ Enrollments ☒ Qualifying Moves

Qualifying Arrival Date From: Qualifying Arrival Date To:

Report Data with: ☒ Exclude International Moves ☒ Exclude Intrastate Moves

Submit Clear Filter Cancel

Reports – Demonstration 5: Other Reports (cont'd)

MSIX Practice #2:

Use the **Enrollments in Multiple States Report** to allow recruiters to view students that have enrollment records in other states in addition to their own. Recruiters can gain insights on interstate relationships regarding migrant students. This information may support initiatives for certain states to collaborate with one another's Migrant Education Programs.

The screenshot shows a dialog box titled "Enrollment in other States Report Filter". It contains two sections for date filtering and a section for state selection.

Date Filters for California Enrollments:

Enrollment Date From: [] Enrollment Date To: []

Withdrawal Date From: [] Withdrawal Date To: []

Report Data with: ☐ Open Enrollment Only

Date Filters for Other State Enrollments:

Enrollment Date From: [] Enrollment Date To: []

Withdrawal Date From: [] Withdrawal Date To: []

Report Data with: ☐ Open Enrollment Only

Available States: []

Selected States:

- Alabama
- Alaska
- Arizona
- Arkansas

Buttons: Submit, Clear Filter, Cancel

Common Questions and Issues

- **Logout** – use Logout functionality to securely end session. Do not close browser.
- **Correct MSIX Data** – Changes in MSIX student data must be made at the State level and then sent to MSIX.
- **Save MSIX as a Bookmark** – When bookmarking MSIX go in and change it to ONLY <https://msix.ed.gov>.
- **Change passwords** – Any user management must be done at the state/regional level.
- **Provide MSIX functionality feedback** – Contact the MSIX Help Desk msixsupport@deloitte.com or (866) 878-9525.

More on Frequently Asked Questions (FAQs) from the MSIX Trainers' Corner:
<https://msix.ed.gov/msix/training.html>

Resources | Question and Answer

MSIX Trainers' Corner – <https://msix.ed.gov/msix/training.html>

- Self-paced user training
- User and Reports Manuals
- Archived presentations

Name	Contact Info
Pat Meyertholen	patricia.meyertholen@ed.gov
MSIX Help Desk	msixsupport@deloitte.com or (866) 878-9525
Migrant Records Exchange Initiative Website	http://www.ed.gov/admins/lead/account/recordstransfer.html

Thanks to our attendees and guest speakers for participating today!